

Appendix B

APPENDIX B

The results of each individual airport's passenger surveys are discussed in the following sections.

A. Laughlin/Bullhead International Airport

Approximately 20 surveys were returned from passengers who departed from the Laughlin/Bullhead International Airport during the survey period. Of these passengers, approximately 45 percent identified themselves as full-time residents of the area, compared to 50 percent who identified themselves as visitors and 5 percent as seasonal residents. The three states with the largest response from visitors included Arizona, Florida, and Nevada. For those travelers visiting the area, approximately 83 percent purchased their tickets from travel agents, and 17 percent purchased their ticket directly from the airline. These visitors responded that they use the Laughlin/Bullhead International Airport for departures approximately 168 times a year, with one respondent accounting for 150 of these departures. Excluding this respondent, the other respondents average three trips per year. In terms of the purpose of the visitors' trips to the area, 70 percent indicated they were traveling for business, versus 30 percent who were traveling for vacation/personal reasons. Gold Rush Apartments was listed as a local business that was visited by a non-local traveler. None of the visitors who responded to the survey indicated they use an airport other than Laughlin/Bullhead International Airport for their travel to and from the area. Of the various factors considered by travelers when purchasing airline tickets, the survey results showed that frequency of service was the most important factor, followed closely by cost of airline travel and availability of large jet service. Visitor respondents also indicated a nearby hotel/motel was the main factor in deciding to use Bullhead International Airport versus a competing airport. Other important factors included availability of rental cars and an adequate waiting area.

Of the 45 percent of the respondents who indicated they were full-time local residents of the Laughlin/Bullhead City area, actual cities of residence identified by the residents included Bullhead City, Laughlin, and Kingman. The majority of the local residents purchased their tickets directly from the airline (62 percent); an additional 25 percent purchased their tickets from travel agents. The remaining 13 percent of the respondents indicated another, non-specified method of ticket purchase. Local travel agencies used for ticket purchases were Bullhead Travel, Caboose Travel, and Travel Unlimited. Cities that were frequently noted as final destinations included Phoenix, Los Angeles, Orlando, and Houston. The survey results showed a total of 124 departures by local survey respondents from the Laughlin/Bullhead International Airport. This number of departures equals approximately 13 departures per local survey respondent. The type of travel for local residents during the survey period was approximately 88 percent for vacation/personal travel and 12 percent for business travel. Local resident respondents noted that they use other airports for some of their departures. These other airports included Las Vegas and Phoenix. These airports accounted for an additional 85 annual departures by residents of the market area. All of the resident respondents indicated they use a private automobile to reach other competing airports. Resident travelers noted that cost of airline travel and reliability of service were

the most important factors considered in the purchase of an airline ticket. It was also noted that on-site auto parking was the main factor in choosing to use the local airport versus a competing airport. Other important factors included telephone service and nearby hotel/motel.

The one seasonal resident respondent to the survey purchased their ticket from a travel agency. This respondent indicated business travel as the purpose of their trip. The respondent also noted that they departed from the local airport once a year.

The survey showed that 78 percent of all respondents used Laughlin/Bullhead International Airport for departures, while the remaining 22 percent used other airports to depart from the area. The majority of the total respondents indicated they were between the ages of 18 through 24 (89 percent). Approximately 5 percent were between the ages of 45 through 54 and 5 percent were 75 years old or over. Approximately 47 percent of the respondents described the nature of their employment as service-oriented; 16 percent indicated transportation/communications, 11 percent noted they were retired, 11 percent indicated financial/insurance/real estate, and the remaining 15 percent described the nature of their employment in the categories of manufacturing (5 percent), wholesale trade (5 percent), and retail trade (5 percent). The majority of the respondents indicated an annual gross family income of \$20,001-\$40,000 (35 percent). Approximately 29 percent identified an annual gross family income of over \$100,000, while 18 percent indicated \$40,001-\$60,000 and the remaining 18 percent was divided equally between \$10,000-\$15,000, \$15,001-\$20,000, and \$60,001-\$80,000. It was noted that scheduled airline service was needed from Bullhead City to Phoenix and Winslow to Phoenix. Approximately 60 percent of the total respondents indicated they would not be willing to pay higher fares for improved service, while the remaining 40 percent indicated they would pay higher fares.

B. Flagstaff-Pulliam Airport

Flagstaff-Pulliam Airport received approximately 126 returned surveys during the survey period. Of the passengers represented by the survey responses, approximately 36 percent identified themselves as full-time residents of the area, 6 percent as seasonal residents, and 58 percent identified themselves as visitors. The five states with the largest response from visitors included California, Texas, Arizona, Illinois, and New York. For those travelers visiting the area, approximately 53 percent purchased their airline ticket through a travel agency and 25 percent purchased their tickets directly from the airline. The remaining visitors used the following methods of purchase: in-home computer (6 percent), other (6 percent), military (4 percent), and in-house corporate ticketing (6 percent). These visitors responded that they use the Flagstaff-Pulliam Airport for departures approximately 254 times a year, or an average of 3.5 trips per respondent. In terms of the purpose of the visitors' trips to the area, 37 percent indicated they were traveling for business, versus 55 percent who were traveling for vacation/personal, 3 percent for military, and 5 percent for other purposes not specified in the survey. Business travelers indicated they most frequently visit local companies including Medical Science Systems, Data Reveal Company, and Arizona Healthcare. Survey results showed that the most important factor considered by visitors

when purchasing their airline ticket was cost of airline travel, followed closely by reliability of service. Nonstop versus connecting service and time of day preference were also ranked as important factors. Availability of rental cars, telephone service, and nearby hotel/motel were the most important factors considered by visitor respondents when deciding to use the local airport versus a competing airport.

Of the survey respondents who indicated they were local residents of the Flagstaff-Pulliam Airport area (36 percent), the actual cities of residence identified by the residents included Flagstaff, Bellemont, Williams, and Marble Canyon. The majority of the local residents purchased their tickets from travel agents (47 percent), while 29 percent of local residents purchased their tickets directly from the airline. Approximately 13 percent of the local respondents indicated they used in-house corporate ticketing; the remaining 11 percent used an in-home computer or a military travel agency to purchase their airline tickets. Top local travel agencies that were used included Flagstaff Travel, Professional Travel, Bowers, and Koala Travel. The survey results showed a total of 549 departures by local survey respondents from the Flagstaff-Pulliam Airport. This level of departures equals approximately 12.2 departures per local survey respondent. The approximation for average departures per local survey respondent is the result of significantly higher business departures over vacation/personal departures. Frequently indicated final destinations of local travelers included Phoenix, Los Angeles, Las Vegas, St. Louis, Chicago, and Seattle. The type of travel for full-time local respondents during the survey period was divided 66 percent business travel and 32 percent vacation/personal travel; the remaining 2 percent indicated another purpose of travel. Local resident respondents noted that they use other airports for their departures including Phoenix and Las Vegas. These airports accounted for an additional 204 annual departures. Approximately 91 percent of local resident respondents indicated they use a private automobile to reach a competing airport, while 7 percent use a rental automobile and 2 percent use the public bus system. Reliability of service was found to be the main factor in local resident respondents' decision to purchase an airline ticket, followed closely by cost of airline travel and time of day preference. Local respondents also indicated that on-site auto parking was the most important factor when deciding to use the Flagstaff-Pulliam Airport versus a competing airport.

Of the 6 percent of the survey respondents who indicated they were seasonal residents, approximately 72 percent purchased their airline tickets from travel agents. The remaining 28 percent was equally divided between in-house corporate ticketing (14 percent) and tickets purchased directly from the airline (14 percent). Seasonal residents responded that they use the Flagstaff-Pulliam Airport for departures approximately 53 times a year, or an average of 6.6 trips per seasonal respondent. The type of travel for seasonal residents during the survey period was split 75 percent for business travel and 25 percent for vacation/personal travel.

The survey showed that 72 percent of all respondents regularly departed from Flagstaff-Pulliam Airport, while the remaining 28 percent used other airports for their departures from the area. The majority of the respondents indicated they were between the ages of 55 to 64 (85 percent). Approximately 10 percent were between the ages of 18 to 24, 4 percent were 75 years or older, and the remaining 1 percent indicated they were under the age of 18.

Relating to the nature of employment, approximately 29 percent of respondents indicated they were in a service-oriented profession; an additional 21 percent noted they were in the education field; and 11 percent described their profession as government-related. Other professions described fell under the categories of agriculture/forestry/fishing, financial/insurance/real estate, manufacturing, transportation/communications, wholesale trade, construction, mining, and retail trade. Survey results showed that the majority of respondents indicated their annual gross family income exceeded \$100,000; approximately 21 percent indicated an income that fell between \$40,001-\$60,000, 20 percent indicated between \$60,001-\$80,000, 15 percent indicated between \$80,001-\$100,000, and 9 percent indicated an income between \$20,001-\$40,000. The remaining 4 percent was divided equally between annual gross family income's of \$10,000-\$15,000 and \$15,001-\$20,000. The need for scheduled airline service was noted between the cities of Flagstaff and Phoenix, Flagstaff and Las Vegas, Flagstaff and Los Angeles, Flagstaff and Tucson, and Phoenix and Tucson. The majority of the respondents indicated they would not be willing to pay higher fares for improved service (64 percent), while the remaining 36 percent indicated they would be willing to pay higher fares.

C. Kingman Airport

Approximately 24 surveys were returned from passengers who departed from the Kingman Airport during the survey period. Of these passengers, approximately 75 percent identified themselves as full-time residents to the area, compared to 21 percent who were identified as visitors and 4 percent as seasonal residents of the Kingman area. The two states with the largest response from visitors to the area included Arizona and Washington. For those travelers visiting the area, 100 percent used in-house corporate ticketing to purchase their airline tickets. Visitors responded that they use the Kingman Airport for departures approximately 18 times a year, or an average of 3.6 trips per visitor respondent. In terms of the purpose of the visitors' trips to the area, 100 percent indicated they were traveling for business. Local businesses that were visited by these travelers included the Kingman Airport and Martin Swanty Chrysler. One visitor noted that they use the Phoenix airport approximately 2 times per year for traveling to and from the Kingman area. Visitor respondents indicated that cost of airline travel and reliability of service were the main factors considered when purchasing their airline tickets. Time of day preference and airline providing service were also important factors considered by visitor respondents. Visitor respondents also indicated that the availability of rental cars was a prominent factor in their decision to use the local airport versus a competing airport. On-site auto parking and ATM access were among the least important factors considered when choosing an airport.

Of the 75 percent of survey respondents who indicated they were local residents, home cities identified by the residents included Kingman, Lake Havasu City, Phoenix, and Yucca. Approximately 38 percent of the local residents purchased their tickets from travel agents, 31 percent purchased their ticket directly from the airline, and 19 percent made their purchase through a military contract. Other methods of purchase included in-house corporate ticketing (6 percent) and in-home computer (6 percent). All Points Travel was noted as a local travel agency utilized for purchasing tickets. The survey results showed a total of 171

departures by local survey respondents from the Kingman Airport. This number of departures equals an average of approximately 9.5 departures per local survey respondent. The two top final destinations noted by local travelers included Phoenix and Las Vegas. The type of travel for local residents during the survey period was split 33 percent for business travel, 33 percent for vacation/personal travel, 17 percent for military travel, and 17 percent for other purposes of travel not mentioned in the survey. Local resident respondents noted that they use other airports for their departures including Las Vegas and Phoenix. These airports accounted for an additional 88 annual departures. All of the resident respondents noted they use private automobiles when traveling to competing airports to begin their trips. Resident respondents indicated that reliability of service was the most important factor considered when purchasing an airline ticket; cost of airline ticket and frequency of service were found to be extremely important as well. When deciding to use the Kingman Airport versus a competing airport, resident respondents were found to value the factors of an adequate waiting area, on-site auto parking, and telephone service. Factors not valued highly in the decision-making process included availability of rental cars, restaurant, and taxi service.

The one seasonal resident respondent indicated that they purchased their tickets directly from the airline. The respondent noted that they depart from the Kingman Airport 20 times a year. The main purpose of travel indicated by this seasonal resident was business travel.

Survey results showed that, overall, 70 percent of the passengers who responded to the survey used the Kingman Airport for departures, while 30 percent used other airports for their departures from the Kingman area. Approximately 50 percent of the total respondents indicated they were between the ages of 25 to 34, while 33 percent indicated they were between the ages of 18 to 24. The remaining 17 percent of total respondents indicated they were under the age of 18. The majority of respondents indicated that the nature of their employment was service-related (32 percent). Survey results showed that approximately 23 percent described their profession as government-related, 14 percent indicated they were retired, and the remaining 35 percent of respondents were divided equally between the employment categories of agriculture/forestry/fishing, construction, retail trade, financial/insurance/real estate, education, healthcare, and transportation/communications. Approximately 40 percent of the total respondents indicated their annual gross family income fell between the range of \$20,001-\$40,000, while the remaining 60 percent was equally divided between the ranges of \$15,001-\$20,000 (20 percent), \$80,001-\$100,000 (20 percent), and over \$100,000 (20 percent). The need for scheduled airline service was noted between the cities of Kingman and Las Vegas. Survey results showed that half of the total respondents would not be willing to pay higher fares for improved services while the other half of total respondents would be willing to pay these higher fares.

D. Lake Havasu City Municipal Airport

Lake Havasu City Municipal Airport received approximately 74 returned surveys from passengers traveling during the survey period. Of these passengers, approximately 64 percent identified themselves as residents of the area, compared to 28 percent who identified

themselves as visitors and 5 percent as seasonal residents. The three states with the largest response from visitors included Arizona, California, and Michigan. For those travelers visiting the area, approximately 60 percent purchased their airline ticket through a travel agency, 20 percent of the respondents purchased their tickets directly from the airline, and 20 percent through in-house corporate ticketing. Visitors responded that they use Lake Havasu City Municipal Airport for departures approximately 75 times a year, or an average of 3.6 trips per respondent. In terms of the purpose of the visitors' trips to the area, 62 percent indicated they were traveling for business versus 38 percent traveling for vacation/personal purposes. The local businesses most frequently visited by these travelers included Lake Havasu Hospital, A & A Electronics Assembly, Buttke Bersch Kwanzek, and Sterilite Corporation. One of the visitors who responded to the survey identified that they were using the airport in Phoenix for a significant number of their departures. This airport accounted for an additional 30 annual departures. Visiting respondents noted that the main factor considered when purchasing airline tickets was reliability of service, followed closely by frequency of service and nonstop versus connecting service. Visitor respondents indicated that availability of rental cars was the main factor in their decision to use Lake Havasu City Municipal Airport versus a competing airport. Telephone service and an adequate waiting area were also considered important factors.

Approximately 64 percent of the survey respondents indicated they were full-time residents of Lake Havasu City. The majority of the local residents purchased their tickets from travel agents (43 percent); an additional 38 percent of local residents purchased their tickets directly from the airline, and 9 percent used corporate ticketing. Of the remaining respondents, 5 percent used an in-home computer and 5 percent purchased their airline ticket through a military travel agency. Local travel agencies that were frequently used included London Bridge Travel, Destinations Travel, Sun Kalhika Travel, and Around the World Travel. Residents of the Lake Havasu City area indicated they travel frequently from the airport. The survey results showed a total of 583 departures by local survey respondents from the Lake Havasu City Municipal Airport. This level of departures equals approximately 12.4 departures per local survey respondent. Top final destinations from the Lake Havasu City Municipal Airport included Phoenix, Los Angeles, Seattle, and Detroit. The type of travel for local residents during the survey period was divided 45 percent business travel, 53 percent vacation/personal travel, and 2 percent military travel. The remaining 6 percent of the local residents did not indicate a purpose for travel. Local resident respondents noted that they frequently use other airports for their departures, primarily Las Vegas, but also Phoenix. These airports accounted for an additional 267 annual departures. Approximately 98 percent of local resident respondents indicated they use a private automobile to reach other competing airports, while the remaining 2 percent use rental cars. Survey results showed that reliability of service was the most important factor considered by local resident respondents when purchasing airline tickets. Other important factors included frequency of service, cost of airline travel, and time of day preference. Local respondents noted that on-site auto parking was the main factor in their decision to use the local airport versus a competing airport. Telephone service and adequate waiting areas were also important factors.

Approximately 5 percent of the respondents indicated they were seasonal residents to the Lake Havasu City area. The majority of these seasonal resident respondents (67 percent) purchased their tickets directly from the airline. The remaining 33 percent purchased airline tickets from a travel agent. Results of the survey showed a total of 25 departures by seasonal resident survey respondents from the Lake Havasu City Municipal Airport. This level of departures equals approximately 6.3 departures per seasonal survey respondent. All of the seasonal residents (100 percent) indicated their main purpose of travel was for business purposes. This distribution of seasonal resident travelers supports the business character of this market.

Approximately 68 percent of all passengers who responded to the survey used Lake Havasu City Municipal Airport for their departures, while the remaining 32 percent used other airports for departures from the area. The majority of total respondents were between the ages of 45-54 (83 percent). Approximately 13 percent of respondents were under the age of 18 and 4 percent were over the age of 75. Survey results indicated that approximately 22 percent of the respondents described the nature of their employment as service-related; an additional 22 percent of respondents were divided equally between government-related and transportation/communication-related professions; 10 percent indicated a profession in manufacturing; and 16 percent were divided equally between professions in the financial/insurance/real estate and education fields. The remaining 30 percent of respondents described their nature of employment within the categories of construction (7 percent), retail trade (7 percent), retirement (7 percent), healthcare (4 percent), utilities (4 percent), and wholesale trade (1 percent). The majority of total respondents indicated an annual gross family income of \$60,001-\$80,000 (35 percent); approximately 25 percent indicated an income of \$20,001-\$40,000, 15 percent indicated an income of more than \$100,000, 10 percent indicated an income of \$40,001-\$60,000, and 10 percent indicated an income of \$60,001-\$80,000. The remaining 10 percent was split evenly between the income ranges of under \$10,000 and between \$15,001-\$20,000. It was noted that commercial airline service was needed between the cities of Lake Havasu City and Phoenix, Lake Havasu City and Yuma, Lake Havasu City and Las Vegas, Tucson and Flagstaff, and Phoenix and Nogales. Approximately 74 percent of the total respondents indicated they would not be willing to pay a higher fare for improved services, while the remaining 26 percent would pay higher fares for improved service.

E. Page Municipal Airport

Approximately 32 surveys were returned from passengers who departed from the Page Municipal Airport during the survey period. Of these passengers, approximately 50 percent identified themselves as full-time residents of the area, compared to 41 percent who identified themselves as visitors and 9 percent as seasonal residents of the area. The states with the largest response from visitors included California and Arizona. For those travelers visiting the area, approximately 50 percent purchased their airline ticket directly from the airline, 33 percent purchased tickets from travel agents, and 17 percent were ticketed via in-house corporate ticketing. Visitors responded that they use Page Municipal Airport for departures approximately 89 times a year, or an average of 6.9 trips per respondent. In terms

of the purpose of the visitors' trips to the area, 46 percent indicated they were traveling for business, versus 54 percent who were traveling for vacation/personal. Local companies that were visited by these respondents included Aramark, Samaritan, Page Hospital, Coldwell Bank, and Scenic Airlines. Visitors noted that they very rarely use other airports when traveling to and from the Page area. Visitor respondents indicated that reliability of airline service was the main factor considered when purchasing airline tickets, followed closely by nonstop versus connecting service and cost of airline travel. Visitor respondents also noted that having a nearby hotel/motel was the prominent factor in choosing the local airport versus a competing airport. Other important factors considered in this decision included availability of rental cars, telephone service, and taxi service.

Of the 50 percent of the survey respondents who indicated they were local residents of the Page area, all but two respondents identified themselves as residents of the City of Page. The majority of the local residents purchased their ticket directly from the airline (63 percent); an additional 31 percent purchased their tickets through a travel agency, and the remaining 6 percent were ticketed via in-house corporate ticketing. Local travel agencies used for ticket purchasing included Bon Voyage Travel, Lake Powell Travel, and Prime Travel. Residents of the Page area indicated they travel frequently from the airport. The survey results showed a total of 174 departures by local survey respondents from the Page Municipal Airport. This level of departures equals approximately 10.9 departures per local survey respondent. Local residents frequently indicated final air travel destinations to Phoenix, Dallas, Los Angeles, and Albuquerque. The type of travel for full-time residents during the survey period was divided equally between business travel (50 percent) and vacation/personal travel (50 percent). Survey respondents from the Page area noted that they use other airports for their departures including Phoenix, Las Vegas, and Flagstaff. These airports accounted for an additional 96 annual departures. Approximately 88 percent of local respondents indicated they use private automobiles to reach competing airports, while the remaining 12 percent use commercial buses. Resident respondents noted that cost of airline travel was the main factor considered when purchasing airline tickets, followed closely by reliability of service and time of day preference. These respondents also noted that availability of rental cars and on-site auto parking were important factors considered when deciding to use the Page Municipal Airport versus a competing airport.

Approximately 9 percent of the survey respondents identified themselves as seasonal residents of the Page area. Of the seasonal respondents, 100 percent purchased their tickets directly from the airline. The survey results showed a total of 72 departures by seasonal resident respondents. One respondent accounted for 50 of these 72 departures. The number of departures for the other two seasonal respondents equals approximately 6 departures per respondent. The type of travel for seasonal residents was 33 percent business and 67 percent vacation/personal. Seasonal residents noted that they sometimes use the Las Vegas airport when they are traveling to and from the Page area.

The survey results showed that, overall, 75 percent of all passenger respondents used Page Municipal Airport for departures from the area; the remaining 25 percent departed from other airports. The majority of the total passenger respondents indicated they were in the age

group of 45-54 (38 percent). Approximately 31 percent indicated they were in the age group of 35-44, 23 percent indicated the age group of 18-24, and the remaining 8 percent indicated they were in the age group of 55-64. When asked about the nature of their employment, approximately 23 percent indicated a transportation/communications-related profession, 13 percent indicated a profession in the construction field, 13 percent indicated finance/insurance/real estate, and 13 percent indicated their nature of employment as service-related. The remaining 38 percent was divided between the categories of government (7 percent), retail trade (7 percent), healthcare (7 percent), agriculture/forestry/fishing (3 percent), utilities (3 percent), mining (3 percent), education (3 percent), and retirement (3 percent). The majority of respondents indicated an annual gross family income of \$40,001-\$60,000 (33 percent); approximately 25 percent indicated an annual gross family income of more than \$100,000, 18 percent indicated an income of \$20,001-\$40,000, and the remaining 24 percent was divided equally between the annual gross family income ranges of \$15,001-\$20,000, \$60,001-\$80,000, and \$80,001-\$100,000. Survey results showed a need for scheduled airline service between the cities of Page and Tucson, Page and Prescott, and Page and Flagstaff. Approximately 62 percent of total respondents indicated they would not be willing to pay higher fares for improved services, while the remaining 38 percent of respondents would pay higher fares.

F. Prescott Ernest A. Love Field Airport

Prescott Ernest A. Love Field Airport had approximately 54 returned surveys. Of the passengers who returned completed surveys, approximately 67 percent identified themselves as full-time residents of the area, compared to 22 percent who identified themselves as visitors and 11 percent as seasonal residents. The state with the largest response from visitors was California. For those travelers visiting the area, approximately 34 percent purchased their ticket through a travel agency, 33 percent purchased their ticket directly from an airline, and 33 percent were ticketed via in-house corporate ticketing. Visitors responded that they use Ernest A. Love Field Airport for departures approximately 41 times a year, or an average of 3.4 trips per respondent. In terms of the purpose of the visitors' trips to the area, 40 percent indicated they were traveling for business, versus 60 percent who were traveling for vacation/personal. Local businesses that were visited by these passengers included Johnson & Johnson, LACO Probation Department, Wulfsberg Electronics, and USDA Forest Service. Visitors indicated they use Ernest A. Love Field Airport for all of their departures from the area. Visitor respondents noted that cost of airline travel was the prominent factor considered when purchasing an airline ticket, followed by reliability of service and time of day preference. Visitor respondents also indicated an adequate waiting area as a factor in deciding to use the local airport versus a competing airport; other important factors included telephone service, availability of rental cars, and taxi service.

Of the survey respondents who indicated they were residents of the Prescott area (67 percent), actual cities identified by residents included Prescott, Gilbert, Prescott Valley, and Chino Valley. The majority of the full-time local residents (51 percent) purchased their tickets directly from the airline; an additional 46 percent of local residents purchased their tickets from travel agents, and the remaining 3 percent of local residents used other methods

for ticket purchase. Local travel agents used for ticket purchasing included Prescott Travel, Kachina Travel, and Adventure Travel. The survey results showed a total of 498 departures by local survey respondents from the Prescott Ernest A. Love Field Airport. This number of departures equals approximately 14.2 departures per local survey respondent. Top final destinations for local residents during the survey period included San Diego, Phoenix, New York, and Los Angeles. The type of travel for local residents during the survey period was divided 58 percent for business travel, 39 percent for vacation/personal travel, and the remaining 3 percent indicated other purposes for travel. Local respondents noted that they use the airport in Phoenix for an additional 270 annual departures. Approximately 78 percent of the local passenger respondents indicated using a private automobile to reach competing airport, while the remaining 22 percent indicated using a commercial bus. Survey results showed that reliability of service was the main factor considered by local respondents when purchasing airline tickets. Nonstop versus connecting service, frequency of service, and time of day preference were also important factors considered. Local respondents also noted that on-site auto parking was an important factor considered when deciding to use the local airport versus a competing airport. Telephone service and an adequate waiting area were also important factors considered in this decision.

Approximately 11 percent of the survey respondents indicated they were seasonal residents of the Prescott area. The method of ticket purchase for seasonal residents during the survey period was divided evenly with approximately 50 percent of respondents purchasing their airline tickets through a travel agency and 50 percent purchasing their tickets directly from the airline. The survey results showed a total of 122 departures from the Ernest A. Love Field Airport. Two of the survey respondents each accounted for 40 departures and 60 departures, respectively. Excluding these respondents, the average number of departures for the seasonal residents equals approximately 5.5. Seasonal residents noted that they use other airports for their departures, including Phoenix and Los Angeles. These airports accounted for an additional 55 annual departures.

Approximately 67 percent of all survey respondents at the Ernest A. Love Field Airport noted that they used the local airport for their departures from the area, while the remaining 33 percent of the respondents used other airports for departures. Approximately 29 percent of total respondents indicated they were between the ages of 25-34 and another 29 percent indicated they were between the ages of 35-44. The remaining 42 percent of total respondents was divided as follows: 18 percent for ages 18-24; 12 percent for ages 45-54; 6 percent for ages 35-44; and 6 percent under 18 years of age. Regarding the nature of the respondents' employment, the majority of respondents described a service-related profession (26 percent). Approximately 16 percent indicated a transportation/communications-related profession, 10 percent indicated they were in the education field, and 24 percent of the respondents were split equally into the categories of retirement, government, and medical. The remaining 24 percent described their nature of employment relating to manufacturing (6 percent), wholesale trade (6 percent), retail trade (6 percent), agriculture/forestry/fishing (2 percent), financial/real estate/insurance (2 percent), mining (2 percent), and utilities (2 percent). Approximately 80 percent of the total respondents were split evenly into the annual gross family income levels of less than \$10,000 (20 percent); \$20,001-\$40,000 (20 percent);

\$60,001-\$80,000 (20 percent); and over \$100,000 (20 percent). The remaining 20 percent of respondents was divided between the annual gross family income levels of \$10,000-\$15,000 (7 percent); \$40,001-\$60,000 (6 percent); and \$80,001-\$100,00 (7 percent). Survey results indicated the need for scheduled airline service between the cities of Prescott and Phoenix, Prescott and Tucson, Prescott and Bullhead City, and Prescott and Flagstaff. The majority of total respondents indicated they would be willing to pay a higher fare for improved services (62 percent), while the remaining 38 percent would not be willing to pay higher fares. It should be noted that this market is the only one in the study with a higher percentage of respondents willing to pay a higher fare for improved airline service.

G. Show Low Municipal Airport

Approximately 60 surveys were returned from passengers who departed from the Show Low Municipal Airport during the survey period. Of these passengers, approximately 42 percent identified themselves as full-time residents of the area, 42 percent as visitors, and 16 percent were identified as seasonal residents. The four states with the largest response from visitors to the area included Arizona, California, Alabama, and Florida. For those travelers visiting the area, approximately 72 percent purchased their ticket directly from the airline while the remaining 28 percent purchased their airline ticket from a travel agency. Visitors responded that they use the Show Low Municipal Airport for departures approximately 71 times a year, or an average of 2.8 trips per visitor respondent. In terms of the purpose of the visitors' trips to the area, approximately 52 percent indicated they were traveling for vacation/pleasure, compared to 48 percent who were traveling for business. Local businesses that were visited by these travelers included Abitibi Consolidated, Scintastic USA, and Stone Container. The visitors who responded to the survey indicated they sometimes use other airports for departures. These airports included Phoenix, Las Vegas, and Los Angeles. These airports accounted for an additional 77 annual departures. Visitor respondents noted that reliability and nonstop service were the main factors considered when purchasing airline tickets. Cost of airline tickets and frequency of service were also important factors considered by visitor respondents. Visitor respondents also indicated that being in close proximity to a hotel/motel was a prominent factor in their decision to use the local airport versus a competing airport. ATM access was the least important factor considered when choosing an airport.

Of the 42 percent of survey respondents who indicated they were local residents, home cities identified by the residents included Show Low, Pinetop, St. Johns, Lakeside, Snowflake, Vernon, Chandler, and Taylor. Approximately 75 of resident respondents purchased their airline ticket directly from the airline, while 25 percent purchased their tickets from travel agents. Midtown Travel, World of Travel, and Show Low Travel were noted as local travel agencies utilized. The survey results showed a total of 256 departures by local survey respondents from the Show Low Municipal Airport. This number of departures equals an average of approximately 10.2 departures per local survey respondent. Top final destinations noted by local travelers included Phoenix, San Diego, and Boston. The type of travel for local residents during the survey period was split 72 percent for business travel, 24 percent for vacation/personal travel, and 4 percent for other purposes of travel not indicated in the survey. Resident respondents noted that they use other airports for their departures including

Phoenix, Las Vegas, Albuquerque, and Flagstaff. These airports accounted for an additional 155 annual departures. All of the resident respondents noted they use private automobiles when traveling to competing airports to begin their trips. Resident respondents indicated that reliability of service and time of day preference were the main factors considered when selecting a departure airport; the cost of the airline ticket and frequency of service were found to be extremely important factors. When deciding to use the Show Low Municipal Airport versus a competing airport, resident respondents were found to value on-site auto parking and telephone service. Factors not highly valued by residents in the decision-making process included ATM access and availability of rental cars.

The majority of seasonal respondents indicated they purchased their airline ticket directly from the airline (70 percent); the remaining 30 percent was divided equally between purchasing tickets from a travel agent, corporate in-house ticketing, and other methods not indicated on the survey. Seasonal respondents noted they depart from Show Low Municipal Airport 62 times per year, or an average of 6.2 departures per seasonal respondent. Approximately 60 percent of the respondents indicated vacation/personal travel as the purpose of their trip, compared to 40 percent who indicated business travel. Seasonal respondents indicated they use other airports for departures including Phoenix, Albuquerque, and Los Angeles. These airports accounted for about 70 annual departures. Seasonal respondents indicated that reliability of service was the main factor considered when selecting a departure airport. Other important factors included cost of the airline ticket and schedules. Seasonal respondents also noted that on-site parking and telephone service were important factors considered when deciding to use the Show Low Municipal Airport versus a competing airport.

Survey results showed that, overall, 56 percent of the passengers who responded to the survey almost always used the Show Low Municipal Airport for departures, while 44 percent used Show Low plus other airports for their departures from the Show Low area. Approximately 31 percent of the total respondents indicated they were between the ages of 35 to 44, while 25 percent indicated they were between the ages of 45 to 54. The remaining 44 percent were divided between ages 25 to 34 (17 percent), 55 to 64 (13 percent), 65-74 (7 percent), 18 to 24 (5 percent), and over 75 years of age (2 percent). The majority of respondents indicated that the nature of their employment was service-related (13 percent). Survey results showed that approximately 44 percent were split evenly with professions related to construction, government, transportation, and other. The remaining 43 of respondents indicated the nature of their employment in the categories of finance/insurance/real estate (8 percent), retail trade (8 percent), manufacturing (7 percent), retired (7 percent), agriculture/forestry/fishing (5 percent), medical (4 percent), utilities (2 percent), and wholesale trade (2 percent). Approximately 28 percent of the total respondents indicated their annual gross family income fell between the range of \$20,001-\$40,000; the remaining 72 percent was divided between the income ranges of \$40,001-\$60,000 (25 percent), over \$100,000 (22 percent), \$80,001-\$100,000 (13 percent), \$15,001-\$20,000 (6 percent), and \$60,001-\$80,000 (6 percent). The need for scheduled airline service was noted between Show Low and other Arizona cities including Tucson, Sedona, Phoenix, Prescott, and Page. Survey results showed that 62 percent of the total respondents would not

be willing to pay higher fares for improved services, while the remaining 38 percent would be willing to pay higher fares.

H. Sierra Vista Municipal Airport

Approximately 46 surveys were returned from passengers who departed from the Sierra Vista Municipal Airport during the survey period. Of these passengers, approximately 76 percent identified themselves as residents of the area, compared to 24 percent who were identified as visitors. The states with the largest response rate from visitors included Missouri, California, and Ohio. For those travelers visiting the area, approximately 40 percent purchased their airline ticket through a travel agency, 20 percent purchased their ticket directly from the airline, 20 percent used a military travel agency, and the remaining 20 percent of the visitor respondents used other methods for airline ticket purchase. Visitors responded that they use Sierra Vista Municipal Airport for departures approximately 27 times a year, or an average of 5.4 trips per respondent. In terms of visitor trip purpose, 50 percent of the passengers indicated they were traveling for business, versus 40 percent who were traveling for vacation/personal, and 10 percent for military travel. Local businesses that were visited by these respondents included Bella Vista Watch Company, Kuby Company, and the Sierra Vista Community Hospital. Visitors noted using Sierra Vista Municipal Airport for all airline trips to the Sierra Vista area. Visitor respondents indicated that frequency of service and time of day preference were the most important factors considered when selecting a departure airport. Reliability of service and scheduled versus charter service were found to be important factors. Visitor respondents also indicated that availability of rental cars, on-site auto parking, telephone service, and having a nearby hotel/motel were all of equal importance when deciding to use the local airport versus a competing airport. Remaining factors that were of importance included restaurant choices, taxi service, an adequate waiting area, and ATM access.

Approximately 76 percent of the survey respondents indicated they were residents of the Sierra Vista area. Home locations identified by these residents included Sierra Vista, Fort Huachuca, and Bisbee. The majority of the local residents purchased their tickets from travel agents (50 percent), an additional 14 percent of local residents purchased their tickets directly from the airline, and 12 percent purchased their tickets through a military travel agency. For the remaining local passenger respondents, 9 percent purchased their airline tickets through an in-home computer, 9 percent indicated using other methods of ticket purchase, and 6 percent purchased their tickets via in-house corporate ticketing. Local travel agencies used by these respondents included Travel Works, Globetrotter Travel, Cochise Travel, and Blue Ribbon Travel. The survey results showed a total of 210 departures by resident respondents. This number of trips equals approximately 6 departures per resident survey respondent. Top final destinations for these local respondents during the survey period included Phoenix, Los Angeles, Boston, and various cities in Texas. The type of travel for local residents during the survey period was 65 percent for business travel, versus 29 percent for vacation/personal travel and 6 percent for military travel. Local respondents noted that they use also other airports for their departures, primarily Tucson, and to a lesser extent, Phoenix and Las Vegas. These airports accounted for an additional 83 annual departures. Approximately 90 percent

of local respondents indicated using a private automobile to reach other competing airports, while the remaining 10 percent used van/bus/limo service. Resident respondents noted that reliability of service was the main factor considered when selecting a departure airport, followed closely by cost of airline travel and time of day preference. Resident respondents also indicated that on-site auto parking was an important factor in deciding to use the Sierra Vista Municipal Airport versus a competing airport.

Survey results showed that 74 percent of all passenger respondents predominately used Sierra Vista Municipal Airport for their departures, while the remaining 26 percent of passenger respondents used Sierra Vista and other airports for departures from the area. The majority of total passenger respondents indicated they were between the ages of 35-44 (85 percent), while approximately 12 percent indicated they were between the ages of 18-24 and 3 percent indicated they were 75 years or older. Approximately 41 percent of the total respondents described the nature of their employment as government-related; 18 percent described a profession in the medical field, 14 percent described their employment in the category of services, 7 percent described manufacturing, and the remaining 20 percent of respondents described the nature of their employment in the categories of utilities (5 percent), transportation (5 percent), retail trade (5 percent), financial/insurance/real estate (2 percent), and other (3 percent). Survey results showed that the majority of respondents identified an annual gross family income in the range of \$20,001-\$40,000 (31 percent). Approximately 21 percent identified an income in the range of \$40,001-\$60,000, 19 percent identified an income in the range of \$60,001-\$80,000, and 17 percent described an annual gross family income greater than \$100,000. The remaining 12 percent of respondents identified an annual gross family income between the ranges of \$80,001-\$100,000 (7 percent) and \$15,001-\$20,000 (5 percent). The survey results showed that there is a need for scheduled airline service between the cities of Sierra Vista and Phoenix, Sierra Vista and Yuma, and Sierra Vista and Tucson. Of the total passenger respondents, approximately 58 percent indicated they were not willing to pay higher fares for improved service, while the remaining 42 percent indicated they would be willing to pay higher fares.

I. Yuma International Airport

Yuma International Airport received approximately 139 returned surveys during the survey period. Of the responding passengers, approximately 50 percent identified themselves as visitors to the area, compared to 45 percent who identified themselves as full-time residents and 5 percent as seasonal residents. The five states with the largest response from visitors included California, Arizona, Washington, Florida, and Texas. For those travelers visiting the area, approximately 58 percent purchased their airline ticket through a travel agency, 19 percent purchased their ticket directly from the airline, 10 percent used in-house corporate ticketing, and 13 percent used military travel agents to purchase their tickets. Visitors responded that they use the Yuma International Airport for departures approximately 334 times a year, or an average of 4.8 trips per visitor respondent. In terms of the purpose of the visitors' trips to the area, the majority of the visitor respondents indicated they were traveling for business (70 percent); an additional 23 percent were traveling for vacation/personal; and the remaining 7 percent were traveling for military. Local businesses that were visited by

these passengers included Yuma Proving Ground, General Motors, Yuma Medical Center, Pepsi Cola, and Crites & Associates. Visitor respondents noted that reliability of service was the main factor considered when selecting a departure airport, followed closely by the factors of frequency of service, cost of airline travel, and nonstop versus connecting service. Visitor respondents also noted that a nearby hotel/motel was also a pertinent factor when deciding to use Yuma International Airport versus a competing airport. Other important factors included availability of rental cars and an adequate waiting area.

Approximately 45 percent of the survey respondents indicated they were local residents of the Yuma area. The majority of the local residents purchased their tickets from travel agents (52 percent); an additional 33 percent purchased their tickets directly from the airline, and 7 percent indicated using other methods for ticket purchase. For the remaining local passengers, 3 percent purchased their tickets through an in-home computer, 3 percent indicated they used corporate ticketing, and 2 percent used a military travel agency. Local travel agencies used by these passengers included American Express Travel, Bison Travel, New World Travel, and Tour West Travel. The survey results showed a total of 445 departures by local survey respondents from Yuma International Airport. This level of departures equals approximately 7.2 departures per local survey respondent. The top destinations for local residents during this survey period included Phoenix, San Antonio, Boston, Philadelphia, Chicago, and Seattle. The type of travel for full-time local residents was split 56 percent vacation/personal travel, 37 percent business travel, and 4 percent military travel. Of the remaining local respondents, 3 percent indicated other purposes for travel. Local resident respondents noted that they use other airports for their departures, primarily Phoenix, and to a lesser extent, San Diego. These airports accounted for an additional 155 annual departures. The majority of respondents indicated using a private automobile to reach competing airports (88 percent). Approximately 6 percent of respondents used rental cars, 4 percent of respondents used vans/buses/limos and the remaining 2 percent of respondents used air charter to reach competing airports. Local resident respondents indicated the main factor considered when selecting a departure airport was cost of airline travel, followed by reliability of service and nonstop versus connecting service. Local respondents also indicated that on-site parking was an important factor when deciding to use the local airport versus a competing airport. Other important factors included telephone service and an adequate waiting area.

Of the remaining respondents, 5 percent indicated they were seasonal residents of the Yuma area. The majority of the seasonal residents purchased their tickets from travel agencies (60 percent); an additional 20 percent purchased tickets directly from the airline, and 20 percent purchased their ticket through corporate in-house ticketing. Survey results showed a total of 86 departures by seasonal resident respondents from the Yuma International Airport. Two of the respondents accounted for 72 of the 86 departures. Excluding these respondents, the level of departures for the other respondents equals approximately 4.7 trips per survey respondent. The type of travel for seasonal residents was 60 percent business travel, versus 40 percent vacation/personal travel. Seasonal residents noted that they also use other airports for their air travel, primarily Phoenix, and to a lesser extent, San Diego. These airports accounted for an additional 22 annual departures.

Approximately 82 percent of the survey respondents used Yuma International Airport for their departures, while the remaining 18 percent used Yuma International and other airports for departures from the area. The majority of total survey respondents identified their age between the range of 45-54 (88 percent); approximately 6 percent identified their age between the range of 18-24, 4 percent identified they were 75 years old or over, and 2 percent identified they were under 18 years of age. When questioned on the nature of employment, the majority of respondents described the nature of their employment as government-related (23 percent), 16 percent in the category of services, and 12 percent described their profession in the category of manufacturing. The remaining 48 percent described the nature of their employment in the categories of retail trade (7 percent), healthcare (7 percent), education (7 percent), retirement (6 percent), agriculture/forestry/fishing (5 percent), construction (5 percent), financial/insurance/real estate (5 percent), transportation (4 percent), wholesale trade (3 percent), and mining (1 percent). Approximately 30 percent of all survey respondents identified an annual gross family income of over \$100,000, while 22 percent of respondents identified an income within the range of \$40,001-\$60,000, 20 percent identified an income within the range of \$60,001-\$80,000, and 18 percent identified an income within the range of \$20,001-\$40,000. The remaining 10 percent of respondents were divided between an annual gross family income of \$80,001-\$100,000 (6 percent); \$10,000-\$15,000 (2 percent); and \$15,001-\$20,000 (2 percent). Survey results showed a need for scheduled airline service between the cities of Yuma and Phoenix, Yuma and Tucson, Yuma and Flagstaff, Yuma and Las Vegas, and Phoenix and Kingman. Of the total respondents surveyed, approximately 66 percent indicated they would not be willing to pay higher fares for improved service, while the remaining 34 percent of respondents would be willing to pay higher fares for improved service.